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## Turkey

### Oilseeds and Products

### Soybeans and Products Update

**2002**

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#### **Report Highlights:**

**Turkish soybean production doubled to reach 90,000MT in MY2002, but remains insufficient to meet domestic demand for soybeans and products. During MY2001 Turkish soybean imports increased seventy-one percent to reach 654,000MT, soy oil imports increased two hundred and forty-three percent to reach 260,000MT but soybean meal imports declined thirty-five percent to 375,000MT. The United States continues to dominate the Turkish soybean and meal import markets with eighty-five and seventy-nine percent shares respectively. Soybean and product consumption in Turkey is expected to continue to grow.**

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Includes PSD changes: Yes  
Includes Trade Matrix: Yes  
Unscheduled Report  
Ankara [TU1], TU

**Production**

MY2002 soybean area and production are now estimated as 40,000 hectares and 90,000MT – twice last year's level. Farmers in the Cukurova region, where eighty percent of the local soybeans are grown, reportedly shifted from corn to soybeans due to herbicide problems with corn last season. The bonus, TL90,000 (about 6 cents) per kilogram, which was paid for soybean last year also motivated farmers.

Domestic production of soybean meal and soybean oil also increased. This trend is expected to continue as crushing facilities expand and modernize to meet the growing domestic demand for fullfat soya, soybean meal and soy oil.

**Consumption**

The poultry industry continues to be the main consumer of soybeans and products. After ten years of continuous growth, the local broiler industry was negatively affected by the economic crisis that started in late 2000 and continued through 2001. Despite the economic downturn, soybean products consumption has increased significantly in the past year as the broiler industry begins to recover. Specifically, fullfat soya utilization in feed rations has increased during the last two years as fullfat soya replaced meat and bone meal and also fish meal in rations. While fullfat soya consumption has increased, soybean meal consumption decreased somewhat during MY2001. Soybean meal consumption is expected to recover during MY2002 due to availability of low-priced locally produced meal.

Soy oil consumption has increased in MY2001 due to the increased consumption of blended oils caused by high domestic and international prices of sunflowerseed oil, the most favored, local vegetable oil. Soy oil is also used by the local poultry industry as a cheap energy source.

**Trade**

Favorable crushing margins during the MY2001 and the customs tax changes in June, which favored seed imports rather than meal and oil, caused soybean imports to increase significantly. MY2001 soybean imports (according to private sources) were about 654,000MT compared to 382,000MT in MY2000. The U.S. continued to dominate the import market with 85 percent share.

Soybean meal imports during MY2001 decreased to 373,000MT from 508,000MT the previous year due to increased domestic production and larger utilization of fullfat soya in rations. The U.S. continues to be the market leader for soybean meal with 79 percent market share.

U.S. exports of soy oil to Turkey continue to increase due to increased consumption of low priced blended oils. MY2001 soy oil imports (according to private sources) were about 250,000MT of which 85,000MT was U.S. soy oil. Soy oil imports and domestic consumption are forecast to decline in MY2002 due to the increased availability of domestic sunflower oil.

The E.U. continues to be another source for soy oil imports due to a tariff rate quota agreement that Turkey has for 60,000MT crude soy oil and 2,000MT refined soy oil. Turkey also has 9,300MT crude soy oil tariff rate quota agreement with Romania.

**Important Note:** Official Turkish import figures for soybean and products are misleading and reflect a significant difference from private sources. For this report, import figures of private sources are utilized where applicable. For exports official SSI figures are utilized. For soy oil, official SSI and BICO numbers are utilized. For soybeans and meal, Turkish imports that are reported here are higher than official U.S. numbers due to ships departing U.S. for destinations in the Mediterranean basin countries and unloading part of their cargos in Turkey as a second or third stop.

PSD Table						
Country	Turkey					
Commodity	Oilseed, Soybean				(1000 HA)(1000 MT)	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		09/2000		09/2001		09/2002
Area Planted	0	0	0	0	0	0
Area Harvested	30	30	20	20	40	40
Beginning Stocks	40	40	50	50	50	80
Production	40	40	45	45	75	90
MY Imports	382	382	460	654	500	620
MY Imp. from U.S.	320	320	400	558	440	500
MY Imp. from the EC	0	0	0	0	0	0
TOTAL SUPPLY	462	462	555	749	625	790
MY Exports	0	0	0	0	0	0
MY Exp. to the EC	0	0	0	0	0	0
Crush Dom. Consumption	80	80	140	190	180	230
Food Use Dom. Consump.	0	0	0	0	0	0
Feed,Seed,Waste Dm.Cn.	332	332	365	479	395	490
TOTAL Dom. Consumption	412	412	505	669	575	720
Ending Stocks	50	50	50	80	50	70
TOTAL DISTRIBUTION	462	462	555	749	625	790
Calendar Year Imports	387	387	321	390	370	600
Calendar Yr Imp. U.S.	301	301	301	301	320	500
Calendar Year Exports	0	0	0	0	0	0
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

PSD Table						
Country	Turkey					
Commodity	Meal, Soybean				(1000 MT)(PERCENT)	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		09/2000		09/2001		09/2002
Crush	80	80	140	190	180	230
Extr. Rate, 999.9999	0.8	0.8	0.785714	0.8	0.805556	0.8
Beginning Stocks	40	40	50	50	55	60
Production	64	64	110	152	145	184
MY Imports	508	508	480	373	500	380
MY Imp. from U.S.	316	316	330	294	350	310
MY Imp. from the EC	0	0	0	0	0	0
TOTAL SUPPLY	612	612	640	575	700	624
MY Exports	7	7	10	10	15	15
MY Exp. to the EC	0	0	0	0	0	0
Industrial Dom. Consum	0	0	0	0	0	0
Food Use Dom. Consump.	0	0	0	2	0	3
Feed Waste Dom. Consum	555	555	575	503	630	546
TOTAL Dom. Consumption	555	555	575	505	630	549
Ending Stocks	50	50	55	60	55	60
TOTAL DISTRIBUTION	612	612	640	575	700	624
Calendar Year Imports	539	539	378	378	500	370
Calendar Yr Imp. U.S.	296	296	307	307	330	250
Calendar Year Exports	12	12	8	8	15	12
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

PSD Table						
Country	Turkey					
Commodity	Oil, Soybean				(1000 MT)(PERCENT)	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		09/2000		09/2001		09/2002
Crush	80	80	140	190	180	230
Extr. Rate, 999.9999	0.1875	0.1875	0.178571	0.184211	0.183333	0.173913
Beginning Stocks	5	5	5	5	5	25
Production	15	15	25	35	33	40
MY Imports	107	107	160	250	200	180
MY Imp. from U.S.	4	4	100	85	140	50
MY Imp. from the EC	70	70	40	93	40	80
TOTAL SUPPLY	127	127	190	290	238	245
MY Exports	2	2	5	5	10	5
MY Exp. to the EC	0	0	0	0	0	0
Industrial Dom. Consum	20	20	20	30	25	30
Food Use Dom. Consump.	55	55	110	175	143	130
Feed Waste Dom. Consum	45	45	50	55	55	55
TOTAL Dom. Consumption	120	120	180	260	223	215
Ending Stocks	5	5	5	25	5	25
TOTAL DISTRIBUTION	127	127	190	290	238	245
Calendar Year Imports	128	128	155	176	150	150
Calendar Yr Imp. U.S.	8	8	41	62	120	70
Calendar Year Exports	4	4	1	1	5	5
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

Import Trade Matrix			
Country	Turkey		
Commodity	Oilseed, Soybean		
Time period	MY2001	Units:	Metric tons
Imports for:	Sept/Aug		1
U.S.	558026	U.S.	
Others		Others	
Argentina	90497		
Romania	5325		
Total for Others	95822		0
Others not Listed			
Grand Total	653848		0

Import Trade Matrix			
Country	Turkey		
Commodity	Meal, Soybean		
Time period	MY2001	Units:	Metric tons
Imports for:	Sept/Aug		1
U.S.	294157	U.S.	
Others		Others	
Brazil	47800		
Argentina	21800		
Baltic Countries	9243		
Netherlands	262		
England	100		
Total for Others	79205		0
Others not Listed			
Grand Total	373362		0

Import Trade Matrix			
Country	Turkey		
Commodity	Oil, Soybean		
Time period	MY2001	Units:	Metric tons
Imports for:	Sept/Aug		1
U.S.	85198	U.S.	
Others		Others	
Spain	51220		
Argentina	48495		
Portugal	19117		
Belgium	8972		
France	7292		
Greece	6211		
Brazil	4986		
El Salvador	2495		
Israel	1600		
Malaysia	1539		
Total for Others	151927		0
Others not Listed	13018		
Grand Total	250143		0



Export Trade Matrix			
Country	Turkey		
Commodity	Oil, Soybean		
Time period	MY2001	Units:	Metric tons
Exports for:	Sept/Aug		1
U.S.		U.S.	
Others		Others	
Ethiopia	1174		
N.Cyprus	744		
Bulgaria	644		
Baltic Countries	564		
Switzerland	300		
Georgia	224		
Lebanon	211		
Israel	194		
Yemen	172		
Azerbaijan	167		
Total for Others	4394		0
Others not Listed	347		
Grand Total	4741		0